



Tax & Financial Planning Notice

2008 Tax Year

CONGRESSWOMAN

Corrine Brown

THIRD CONGRESSIONAL DISTRICT — FLORIDA



Does the Government Owe You Money?

Read on to see if you are eligible for the Earned Income Tax Credit

Dear Friend,

Did you or your spouse have earned income during 2008? Did your household earn between **\$1 and \$41,646**? If you answered “yes” to these questions, you may be eligible for the Earned Income Tax Credit (EITC). You may also be eligible to receive the Advance EITC directly in your paycheck.

The EITC is a special credit to boost the incomes of working families. This credit reduces the amount of income tax you owe, if any, and is intended to offset some of the increases in living expenses and Social Security taxes. To receive this credit, you must meet the eligibility requirements and you must file a tax return.

Please refer to the reverse side to get more details about filing your forms and how to claim an Advanced EITC, or refer to IRS Publication #596 for a more in-depth explanation of the credit. The Earned Income Tax Credit and Advance EITC payments will not determine eligibility for the following welfare benefits: temporary assistance for needy families, Medicaid and SSI, or food stamps and low-income housing.

Also included are details on several helpful opportunities to improve your future through financial planning tools and workshops which are available to help you wisely invest your tax refund. One excellent tool is the Individual Development Accounts (IDA), which are special matched savings accounts designed to help you with your dreams of home or business ownership, or a post-secondary education. The North East Florida Prosperity campaign is also offering workshops covering building credit, consumer protection, creating spending plans, and managing checking accounts.

Many residents of the Third Congressional District of Florida qualify for the EITC. I hope that all of you who qualify take advantage of this valuable credit and the financial planning programs being offered.

With kindest regards, I am

Sincerely,

Corrine Brown
Member of Congress

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The Earned Income Tax Credit *Additional Money for Your Family*

What is the Earned Income Tax Credit (EITC)?

The EITC is a tax benefit for low-income working families. The EITC is a “refundable” credit, which means a family can benefit even if no federal tax is owed. If a family does owe income tax, the EITC will reduce the amount. If the family’s credit is more than the tax they owe, the Internal Revenue Service (IRS) will send a check for the remaining amount.

Who Can Claim the Credit?

You may be able to claim up to the following amounts: \$438 if you earned less than \$12,880 (\$15,880 for married filing jointly) and are between the ages of 25 and 65; \$2,917 if you earned less than \$33,995 (\$36,995 for married filing jointly) and have at least one qualifying child; or \$4,824 if you earned less than \$38,646 (\$41,646 for married filing jointly) and have more than one qualifying child.

A qualifying child includes a son, daughter, stepson, stepdaughter, foster child or adopted child under age 19; a child under age 24 who is a full-time student; or a child any age who is permanently and totally disabled.

To be eligible you cannot be a dependent claimed by someone else. Also, there are up to ten additional rules that apply to qualify (or disqualify) you. Please review IRS Publication #596.

How Can Families Receive the EITC?

To claim the credit, you must file Form 1040,1040A or 1040EZ; or, to receive the credit in your paycheck, file the Advance Earned Income Tax Credit form with your employer.

Use the EITC worksheet that comes with the tax forms package to figure the credit instructions on the forms, and make sure to use the correct Social

Tax Forms

To order forms 1040, 1040A, 1040EZ and Schedule EITC, call **1-800-TAX-FORM (1-800-829-3676)**, or order forms over the internet at **<http://www.irs.ustreas.gov>**. You can also get free assistance from the IRS by calling **1-800-829-1040**.

Security numbers for yourself and any qualifying children.

Another way to claim the EITC is by claiming it in advance to receive the money in each paycheck. In order to receive the Advance Earned Income Tax Credit, fill out Form W-5 and give it to your employer. This way, you don’t have to wait until tax time to use the money.

Where Can I Get the Forms?

The IRS will mail a tax booklet to your last address on file. If you have moved, or haven’t received your tax booklet from the IRS through the mail, there are several places you can get the forms you need. All income tax forms and instruction for the credits are available at most libraries, banks, post offices, and the Internal Revenue Service. You can also call **1-800-TAX-FORM**.

Where Can I get Answers to Questions About the EITC?

Families can obtain free help from IRS operators during regular weekday business hours by calling **1-800-829-1040**. Call the IRS at **1-800-829-4477** for recorded information about the EITC and the AEITC. The IRS phone number for the hearing impaired with access to TDD equipment is **1-800-829-4059**.

IRS Volunteer Income Tax Assistance (VITA) Program

Families can have their tax forms filled out for free through VITA, the Volunteer Income Tax Assistance program. VITA volunteers are trained by the IRS to provide free tax help to low-income families. From the end of January through April 15, VITA volunteers will be at local sites. Call the IRS operator at **1-800-829-1040** to find out the location of the nearest VITA site.

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Official Business


M.C.

**IMPORTANT
TAX
INFORMATION**

CONGRESSWOMAN

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